

REORGANIZATION PLAN SUBMITTAL SHEET

(Each municipality in a School Union must be indicated separately.)

School Administrative Units Included in APPROVED Notice of Intent	School Administrative Units Submitting Reorganization Plan
Bucksport	Bucksport
Orland	Orland
MSAD 18	MSAD 18

Contact Information:

RPC Chair

Name: Rob Howard, co-chair

Address: 148 Central Street

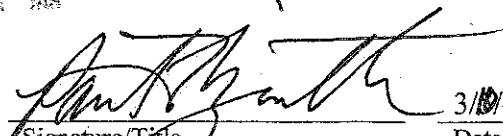
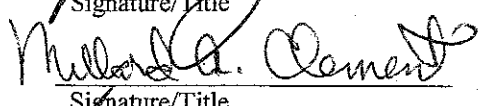
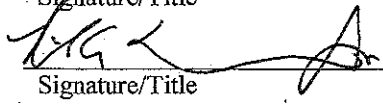
Bucksport, ME 04416

Telephone: 479-5700

email: Rob.Howard@bucksportschools.com

Date Plan Submitted: 3/13/08

Proposed RSU Operational Date: 7/1/09


Signature/Title

Signature/Title

Signature/Title

3/10/08
Date

Bucksport School Department
SAU

3/11/08
Date

Orland School Department
SAU

3/12/08
Date

MSAD 18 Prospect & Verona
SAU

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Reorganization Plan Cover Sheet
(Please attach Reorganization Plan as Exhibit A)

Required Elements							
Law Reference Item Number Sub- Chapter 2	Item	N/A	Complete	In Progress	Not Yet Started	Identified Barrier ¹	Need Assistance ²
3.A(1)	SAUs included in RSU		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.A(2)	Size of governing body		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Composition of governing body		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Apportionment of governing body		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.A(3)	Method of voting of the governing body		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.A(4)	Composition of local school committees	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Powers of local school committees	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Duties of local school committees	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.A(5)	Disposition of real & personal school property		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.A(6)	Disposition of existing school indebtedness (if not using provisions of section 1506)		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Disposition of lease-purchase obligations (if not using provisions of section 1506)		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.A(7)	Assignment of school personnel contracts		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Assignment of school collective bargaining agreements		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Assignment of other school contractual obligations		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.A(8)	Disposition of existing school funds and existing financial obligations		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.A(9)	Transition plan that addresses the development of a budget for the first school year		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Transition plan that addresses interim personnel policies		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.A(10)	Documentation of the public meeting(s) held to prepare or review reorganization plan		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.A(11)	Explanation of how units that approve reorganization plan will proceed if one or more units do not approve the plan		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.A(12)	Estimate of cost savings to be achieved		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.A(13)	Such other matters as the governing bodies of the school administrative units in existence on the effective date of this chapter may determine to be necessary		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

¹ Please explain why this is a barrier and what assistance you need to remove this barrier on the next page.

² Please explain what assistance you need to complete this portion of your plan, and state from whom you need assistance, on page 3.

Parameters for Plan Development							
Law Reference Item Number Sub- Chapter 2	Item	N/A	Complete	In Progress	Not Yet Started	Identified Barrier ³	Need Assistance ⁴
3.B(1)	Enrollment meets requirements (2,500 except where circumstances justify an exception ⁵)		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sec. XXXX-36, Parameter B	When viewed in conjunction with surrounding proposed units, may not result in one or more municipalities being denied the option to join an RSU		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.B(2)	Comprehensive programming for all students grades K - 12.		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Includes at least one publicly supported high school		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.B(3)	Consistent with policies set forth in section 1451		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.B(4)	No displacement of teachers		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	No displacement of students		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	No closures of schools existing or operating during school year immediately preceding reorganization, except as permitted under section 1512		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sec. XXXX-26, Parameter F	The plan must address how the school administrative unit will reorganize administrative functions, duties and noninstructional personnel so that the projected expenditures of the reorganized school unit in fiscal year 2008-2009 for system administration, transportation, special education and facilities and maintenance will not have an adverse impact on the instructional program ⁶		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Collaborative Agreements							
						Yes	No
Does your plan currently include information/documentation on collaborative agreements? (not required, but encouraged)						<input checked="" type="checkbox"/>	<input type="checkbox"/>

Exceptions to 2,500 minimum

Actual number of students for which the SAU is fiscally responsible: **1255**

Exception	Exception Claimed in Plan	Documentation Provided? (Please attach as Exhibit B)	
		Yes	No
Geography	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Demographics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Economics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transportation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Population Density	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other Unique Circumstances	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

³ Please explain why this is a barrier and what assistance you need to remove this barrier on the next page.

⁴ Please explain what assistance you need to complete this portion of your plan, and state from whom you need assistance, on page 3.

⁵ Please note in the *Exceptions to 2500 minimum* section on next page

⁶ This requirement is only for those who plan to be operational as an RSU in fiscal year 2008-2009, in accordance with a Reorganization Plan that is approved by the Commissioner and by the voters.

Explanation of Barriers –

Please use this section to explain any/all barriers identified on the previous page as a barrier in completing your Reorganization Plan.

Law Reference/Required Element	Explanation of the barrier
item 8, 12, policies	Time and the uncertainty of the outcome of the Legislative session are the barriers. It is difficult to continue the drive to complete the Plan when the requirements may change significantly, and when we do not know the status of work already completed.

Assistance Needs –

Please use this section to describe your needs for assistance and from whom you need assistance.

Law Reference/Required Element	Explanation of your assistance need	Assistance needed from whom?
all items	It would be helpful to have specific feedback on what has been submitted, in case changes are needed.	MDE staff

BUCKSPORT, ORLAND, MSAD 18 REORGANIZATION PLANNING COMMITTEE PROPOSED PLAN

The following Reorganization Plan is proposed by the RPC for Bucksport, Orland, and MSAD 18. All language proposed is subject to change in accordance with future changes in statute. That is, if a provision of this a Plan is found to be counter to current or future statute, the relevant sections of the Plan will be reopened by the RPC to be made consistent with statute; and if statute changes to permit changes that would benefit the towns of the RPC, the relevant sections of the Plan will be reopened by the RPC to consider changes. [approved 11/19/07]

Item 1. Specify school systems to be included in the RSU: The school systems included in the Regional School Unit (RSU) shall be Bucksport, Orland, and MSAD 18 (Prospect and Verona), as proposed by the three school boards and approved by the Commissioner.

Item 2. RSU School Board size, composition and apportionment across the towns: The RSU Board shall include four (4) members from Bucksport, two (2) members from Orland, one (1) member from Prospect, and one (1) member from Verona. [approved 10/15/07]

Item 3. Method for voting by RSU Board: Voting shall follow Option D, a locally developed method. Votes shall be weighted based on the most recent estimated census of the town divided by the number of board members allocated to the town. Based on the July 1, 2006 census and using the board size and apportionment from Item 2, votes in 2007-2008 would be weighted as follows:

RSU 9 towns	7/1/06 census	members	weighted votes
Bucksport	4,961	4	1,240
Orland	2,056	2	1,028
Prospect	581	1	581
Verona	647	1	647
total	8,245	8	

[approved 10/15/07]

Item 4. Composition, powers, and duties of any local school committees to be created:

The RSU shall have no local school committees. The RSU shall have a Facilities Oversight Committee consisting of eight members, two from each town. One member from each town shall be appointed by the RSU Board and one member from each town shall be selected by the elected municipal officials of the town. The Committee shall be advisory to the RSU Board regarding facilities planning priorities and the budget for facilities maintenance and improvements. [approved 10/30/07]

Item 5. Disposition of real and personal school property: [approved 11/19/07]

- A. The RSU shall take title to buildings constructed with state funding, in which children receive instruction as of the operational date of the RSU, in accordance with the following stipulations.
 - (1) Prior to the effective date of the RSU, all agreements and understandings about use and upkeep of facilities will be put to writing.
- B. The Town of Bucksport will retain the Junior High Field and grant lease to the RSU for use of the facility per current conditions.
- C. Jewett School will be transferred to the RSU excepting the following:
 - (1) The Town of Bucksport will retain the community center space and storage areas currently occupied by Town of Bucksport.

BUCKSPORT, ORLAND, MSAD 18 REORGANIZATION PLANNING COMMITTEE PROPOSED PLAN

- (2) The Town of Bucksport will retain perpetual easement across property for the public drainage pipe.
- (3) The Town of Bucksport will retain perpetual easement across property for the sanitary sewer.
- (4) The Town of Bucksport will retain easement for the Head Start playground until playground no longer in use.
- (5) The Town of Bucksport will retain the parking lot on Bridge Street adjacent to Jewett School and lease required area for use by the RSU per current conditions
- (6) The Town of Bucksport will retain the drain pipe and sewer line on the parking lot property.
- (7) The Town of Bucksport will retain the swimming pool parking lot.

D. Bucksport High School buildings and grounds will be transferred to the RSU except the following:

- (1) tennis court
- (2) equipment storage shed (beyond power line)
- (3) Miles Lane Trail
- (4) new bathrooms and concession stand
- (5) football field
- (6) property that includes the power line right of way

These facilities will be leased to the RSU with exception of equipment storage facility located beyond power line.

E. Miles Lane School will be transferred to the RSU excepting the following:

- (1) Miles Lane Trail
- (2) Miles Lane Access Road

These facilities will be leased to the RSU for school use per current conditions.

F. Bucksport Middle School buildings and grounds will be transferred to the RSU excepting the following:

- (1) Miles Lane Trail
- (2) Miles Lane Road

These facilities will be leased to the RSU for school use per current conditions.

Storage buildings will be transferred to the RSU.

Middle School ball fields will be transferred to the RSU

A perpetual easement to land off Forest Hill will be granted to the RSU for drainage way and structures.

G. Miles Lane Fields will be leased to the RSU for school use per current conditions.

H. The maintenance of fields in the Bucksport Schools shall become the responsibility of the RSU. The RSU Board may contract with the Town of Bucksport to continue to mow and maintain school grounds in Bucksport.

BUCKSPORT, ORLAND, MSAD 18 REORGANIZATION PLANNING COMMITTEE PROPOSED PLAN

- I. The Bucksport School Board will determine the future need for the Luman Warren School and implement this decision prior to the operational date of the RSU.
 - (1) If this school is claimed by the RSU, the Town of Bucksport will retain a perpetual easement for the sewer pipe across property
 - (2) If this school is claimed by the RSU, the Town of Bucksport will retain a perpetual easement for the storm pipe across property
- J. Orland Consolidated School shall be transferred to the RSU with the following conditions
 - (1) The Orland shop building and the Orland baseball dugouts shall become the property of the RSU
 - (2) The Recreation storage building on the grounds of the Orland Consolidated School shall become the property of the RSU, with continued use by the community as in the past.
- K. The citizens of these towns shall continue to have the same access to school property after the operational date of the RSU, as they had with the municipal school systems.
- L. All educational materials such as books, classroom supplies, equipment, and furniture shall become property of the RSU to continue to be used for the purpose intended: education of children in the schools.
- M. The following vehicles and grounds equipment shall become the property of the RSU:
 - (1) John Deere tractor purchased by Bucksport School Department
 - (2) 2 Toro Z-mowers purchased by Bucksport School Department
 - (3) Pickup purchased by Bucksport School Department
 - (4) 1998 Pontiac van purchased by Bucksport School Department
 - (5) Field watering reel purchased as part of the Middle School construction project
 - (6) All other grounds equipment purchased with Bucksport School Department funds

Item 6. Disposition of existing indebtedness:

- A. Because Bucksport's state-approved debt payments for debt that remains on June 30, 2009 shall continue to be provided by the mil rate required by EPS, these payments are not a tax burden for Orland, Prospect, or Verona. [approved 10/30/07]
- B. The remaining "local-only" debt of the Bucksport School Department that exists on June 30, 2009 for the Miles Lane School gymnasium and Middle School Auditorium shall be the responsibility of Bucksport. [approved 10/30/07]
- C. The remaining "local-only" debt of the Bucksport School Department that exists on June 30, 2009 for the Bucksport High School roofs shall be the responsibility of Bucksport, Orland, Prospect, and Verona, allocated based on state assessed valuation of the towns. [approved 10/30/07]
- D. The local only debt shall be paid in the first year of the RSU. [approved 10/30/07]

Item 7. Assignment of school personnel contracts, school collective bargaining agreements, and other school contractual obligations: [approved 1/7/08]

- A. A list of all written individual employment contracts for non-school employees in the Bucksport School Department follows:

BUCKSPORT, ORLAND, MSAD 18 REORGANIZATION PLANNING COMMITTEE PROPOSED PLAN

Superintendent	contract expires 6/10
Director of School Improvement	contract expires 6/10
Special Education Director	contract expires 6/09
Assistant Spec Ed Director	contract expires 6/09
School Health Coordinator	contract expires 6/09
Adult Education Director	contract expires 7/09

- B. A list of all employees of the existing SAUs who are not school employees and who do not have written individual employment contracts follows.

Bucksport	Central Office Manager
	Administrative Secretary
	Bookkeeper
	School Improvement Secretary
	Special Ed Secretary
	Adult Ed Secretary
	Maintenance Director
	Food Service Director
	3 Kitchen Managers
	3 Head Cooks
	6 Assistant Cooks
	Technology Coordinator
	2 Technology Assistants
Orland	Bookkeeper
	Secretary
	Media Monitor
	Maintenance Supervisor
	2 Custodians
	Food Service Manager
	Assistant Cook

- C. All contracts of school personnel shall be honored by the RSU, except that non-renewal of probationary employees may occur in compliance with statute. The duties and assignments of all employees transferred to the RSU shall be determined by the Superintendent of the RSU or his/her designee. School based employees who are not covered by a Collective Bargaining Agreement are as follows:

Principal Miles Lane and Jewett Schools	contract expires 7/09
Principal Bucksport Middle School	contract expires 6/10
Assistant Principal BMS, half time	contract expires 7/08
Principal Bucksport High School	contract expires 6/09

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Assistant Principal BHS	contract expires 7/09
ASL Interpreter, Bucksport	contract expires 6/08
Adult Education Director	contract expires 7/09
Principal Orland Consolidated School	contract expires 6/10

- D. Pursuant to Section XXXX-43(5), individuals on the lists in A, B, and C, above who are employed on the day before the operational date shall become employed by the RSU as of the operational date, and their contracts shall be assumed by the RSU on the operational date. This provision does not prevent the existing school systems from terminating or non-renewing the contracts of employees in accordance with applicable law before the operational date of the RSU. The list shall be updated and made final no later than the day before the operational date of the RSU.
- E. The following collective bargaining agreements to which the SAUs are a party shall be assumed by the regional school unit board as of the operational date:
- | | |
|-----------------------------|-----------------|
| Bucksport Teachers | expires 8/31/10 |
| Bucksport Support Personnel | expires 6/30/08 |
| Orland Teachers | expires 8/31/08 |
| Orland Ed Techs | expires 6/30/09 |
- All of the employer's rights and responsibilities with respect to collective bargaining shall be fully assumed by the regional school unit board as of the operational date.
- F. Each school system has a contract with First Student for transportation services. The contracts with Bucksport and MSAD 18 expire before the RPC becomes operational. The contract with Orland expires in June 2010. To provide a common contract renewal date for student transportation, the Orland contract shall be shortened by one year. The RSU Board shall advertise for provision of transportation services through a sealed bid process with the contract to take effect when the RSU becomes operational.
- G. The Bucksport School Board, Orland School Committee, and superintendent shall seek to terminate or negotiate for termination of the following contracts prior to the operational date of the RSU.
- (1) All contracts for photocopiers shall be renegotiated as a single RSU contract as soon as this can be accomplished based on the renewal date of existing contracts.
 - (2) The contract for Medicaid billing shall continue as a single contract for the RSU.
 - (3) Annual service contracts, including special education services, shall be the responsibility of the RSU.

Item 8. Disposition of existing school funds and financial obligations, including undesignated fund balances, trust funds, reserve funds, and other funds appropriated for school purposes:

[approved 2/25/08]

- A. Existing Financial Obligations. Pursuant to Section XXXX-36(5) the disposition of existing financial obligations is governed by this plan.

Existing financial obligations shall include the following:

- (1) all accounts payable;

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- (2) to the extent not included as accounts payable, any financial obligations which under generally accepted accounting principles would be considered expenses of the SAU for any year prior to the year the RSU becomes operational, whether or not such expenses were budgeted by the SAU in the year the obligations were incurred, including for example July and August accrued teacher salaries owed for the last school year before the RSU becomes operational; and
- (3) all other liabilities arising under generally accepted accounting principles that can be reasonably estimated and are probable.

Each SAU shall satisfy its existing financial obligations from all legally available funds. If an SAU has not satisfied all of its existing financial obligations, the SAU shall transfer sufficient funds to the region to satisfy its remaining existing financial obligations, and the regional school unit board shall be authorized to satisfy those existing financial obligations on behalf of the SAU. If the SAU does not transfer to the region sufficient funds to satisfy its existing financial obligations, then to the extent permitted by law, the regional school unit board may satisfy those obligations from balances that the SAU transfers to the region. If the available balances transferred are insufficient to satisfy the SAU's existing financial obligations, or are not legally available for that purpose, the regional school unit board may take any action permitted by law so that all of the municipalities of the region are treated equitably with respect to the unsatisfied existing financial obligations of an SAU. For example, to the extent permitted by law, the regional school unit board may satisfy the unpaid existing financial obligations of an SAU in the same manner and with the same authority as for unassumed debt under the provisions of 20-A M.R.S.A. § 1506(4).

Additionally, to the extent permitted by law, if in the judgment of the regional school unit board it must raise funds from all its members to satisfy existing financial obligations of an SAU, the regional school unit board also shall be authorized to raise additional amounts for the purpose of making equitable distributions (which may be made in the form of credits against assessed local shares of the region's approved budget) to those region members that would otherwise bear costs attributable to unsatisfied existing financial obligations of an SAU for which they had no financial responsibility. The intent of the preceding sentence is that financial responsibility for unsatisfied existing financial obligations of an SAU be borne by its members and not by the other members of the region.

- B. Remaining Balances. The balance remaining in the SAU's school accounts after the SAU has satisfied existing financial obligations in accordance with this plan shall be paid to the treasurer of the regional school unit, verified by audit and used to reduce that SAU's contribution as provided by Section XXXX-43(4). Unless the Legislature otherwise provides, in the case of a school administrative district, the school board of the district shall specify in writing to the regional school unit board how the region shall allocate transferred remaining balances between district members. Unless the Legislature otherwise provides, if the district board has not specified in writing to the regional school unit board how this allocation shall occur, then the transferred remaining balances shall be credited to the district's members in proportion to their respective shares of that portion of the total local costs of the region allocable to all of the district's members for the operational year.

Audits of the separate school systems shall be completed by September 30 of the first year the RSU is operational. All accounts receivable and accounts payable shall be determined based on a benefit date of June 30. The separate school systems shall be responsible for accounts payable and shall benefit from accounts receivable, which shall be reflected in the assessment paid to the RSU by October of the first year the RSU is operational. The balance remaining in the school

BUCKSPORT, ORLAND, MSAD 18 REORGANIZATION PLANNING COMMITTEE PROPOSED PLAN

accounts of the Bucksport School Department, the Orland School Department, and MSAD 18 shall be paid to the treasurer of the RSU and verified through the annual audit process pursuant to chapter 221, subchapter 2. These balances shall be used to reduce that unit's first annual local contribution to the RSU. Payment may be made in equal monthly installments during the implementation year.

- C. Reserve Funds. SAUs shall transfer remaining balances of reserve funds to the regional school unit. Unless otherwise provided by applicable law, a transferred reserve fund shall be used in accordance with its original purpose to benefit a school or schools of the SAU. Transferred reserve funds shall be subject to Title 20-A M.R.S.A. § 1491, except that the transfer of funds in a reserve fund or a change in purpose of the fund may only occur in such manner that the funds continue to benefit the members of the SAU that transferred that reserve fund to the region.
- D. Scholarship Funds. SAUs shall transfer remaining balances of scholarship funds to the region. Scholarships shall be limited to the original pool of potential recipients unless otherwise provided by the donor or by applicable law. This includes the following funds:

Teacher Aide Scholarship Fund: to assist teacher aides in earning a bachelor's degree

Weirich Scholarship Fund: for post-secondary scholarships, awarded by the high school scholarship committee

- E. Trust Funds. SAUs shall transfer trust funds to the region. The regional school union board shall be deemed the successor trustee for all purposes, except as provided by the trust or by applicable law.

Spofford Grammar School Fund: for the express benefit of "orphaned scholars" who must be citizens of the Town of Bucksport

Gardiner High School Fund: for the express benefit of any student in need of personal items including but not limited to the purchase of coats, boots, and glasses

- F. Oil tanks and propane tanks shall be filled on June 30 of the last year the separate school systems exist. All of the oil and propane in the tanks shall be valued at the June 30 price. The RSU shall pay Orland for the Orland oil and gas and Bucksport for the Bucksport oil and gas prior to August 1 of the first year the RSU is operational. Tanks are as follows:

	<u>school</u>	<u>oil tank capacity</u>	<u>gas tank capacity</u>
Bucksport	Jewett School	4000 gal	n/a
	Miles Lane School	6000 gal	1000 gal
	Bucksport Middle School	10,000 gal	1000 gal
	Bucksport High School	4000 gal	3:100 gal
Orland	Orland Consolidated School	2500 gal	2:120 gal

- G. All accounts maintained by school organizations or using the RSU tax identification number shall be audited on an annual basis and shall comply with tax laws and RSU policies and procedures. This includes student activity accounts and any other accounts maintained by the RSU, by a school, or by any organization using the RSU's tax identification number.
- H. Bucksport Orland Adult and Community Education shall become RSU 9 Adult and Community Education and all balances and obligations shall be carried over to the new entity when the RSU becomes operational.
- I. Balances of the Orland and Bucksport Food Services programs shall be deposited in the general fund of the respective school department when the RSU becomes operational, and shall be used

BUCKSPORT, ORLAND, MSAD 18 REORGANIZATION PLANNING COMMITTEE PROPOSED PLAN

to offset the school department's assessment by the RSU in the first year the RSU become operational. The first RSU budget shall include an allocation for food services to ensure necessary cash resources for operations.

- J. All purchasing for the RSU in advance of the operational date shall be reimbursed by the RSU once the RSU is operational and has an operating budget to draw upon. The Superintendent shall maintain a list of all such items as they are approved for purchase.

Item 9. Transition plan that addresses the development of the first annual budget for the RSU and interim personnel policies:

A. Development of Transitional Policies

All policies existing in the previous school administrative units shall continue to apply to the same employment positions and schools after they become part of the regional school unit. After the operational date, the regional school unit board and superintendent shall develop and adopt region-wide policies in accordance with applicable law. [approved 11/26/07]

B. Process for development of 2009-2010 RSU budget [approved 11/26/07]

(1) Budget Development Process

- a. Each administrator develop a cost-center budget
- b. Meet as a Team to prioritize as a group
- c. Superintendent makes final decisions on recommendations, presents proposed budget to RSU Board in specified cost center categories and revenue categories
- d. RSU Board reviews/modifies proposed budget, approves budget for citizen consideration
- e. RSU Board presents budget in District budget hearing
- f. Citizens present at District Budget Meeting approve, increase, or decrease budget expenditure lines and appropriate funds accordingly
- g. Within 10 days after District Meeting, RSU Board submits budget to citizen referendum for final approval
- h. If referendum fails, RSU Board decides what budget to take for a second District meeting, and process repeats until the referendum approves the amount approved in the District meeting.
- i. If not resolved by July 1, the RSU implements the most recent budget approved by the RSU Board, until such time as the referendum approves the amount approved in the District meeting.

(2) Draft 2009-2010 Budget Development Timeline

late January	Budgets to Cost Center Administrator
mid February	Budgets to Superintendent
early March	Administrative Team begins Review of Proposed Budget
mid March	Team Finalize Total Proposed Budget
late March	RSU Board Review of Proposed Budget
mid April	RSU Board Vote on Proposed Budget
early May	RSU Board conducts hearing on Proposed Budget
mid May	RSU Meeting held on Proposed Budget

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late May

Referendum on Proposed Budget: within 10 days of district meeting

Item 10. Documentation of the public meeting(s) held to prepare or review the reorganization plan: [approved 11/26/07]

To develop this Plan, the RSU held the several public meetings, all open to the public. Meetings were posted in the Enterprise and the Ellsworth American as well as on the Bucksport School Department web page. Copies of minutes and agendas were provided to all school board members, all four municipal offices, and placed on the web page. For all but one RPC meeting this was mailed in advance of the meeting. Next to each meeting below is the number of citizens attending the meeting? The groundrules of the RPC stipulate that after a motion is made and seconded, and before there is a vote on the motion, the chair asks citizens present if there are any comments or questions on the matter under consideration.

6 pm Monday, September 17, 2007 at Bucksport Town Council Chambers: 2 citizens, 2 press
6 pm Tuesday, October 2, 2007 at Bucksport Middle School Library: 3 citizens, 2 press
6 pm Monday, October 15, 2007 at Bucksport Middle School Library: 6 citizens, 1 press
6 pm Monday, October 22, 2007 at Orland Consolidated School room 40: 7 citizens, 2 press
7 pm Tuesday, October 30, 2007 at Jewett School Conference Room: 7 citizens, 2 press
6 pm Monday, November 19, 2007 at Bucksport High School Library
6:30 pm Monday, November 26, 2007 at Miles Lane School

The plan was discussed at each board meeting held in September, October, and November and at special board meetings held the last week of November when the Boards voted to submit the plan. Meetings were held as follows:

Bucksport: Council Chambers, 7 pm on 9/5/07, 10/3/07, 11/15/07, action following the hearing on 11/28/07

Orland: Orland Consolidated School, 6:30 pm on 9/11/07, 10/9/07, 11/13/07, action following the hearing on 11/27/07

MSAD 18: Central Office, 7 pm on 9/12/07, 10/10/07, 11/14/07, action following the hearing on 11/28/07

Citizens are permitted to speak at all board meetings.

Three hearings were held on the plan to be sent to the Department of Education:

Orland at 6:30 pm on 11/27/07 in the Orland Consolidated School

MSAD 18 at 6 pm on 11/28/07 in the Central Office

Bucksport at 7 pm on 11/28/07 in the Central Office

Item 11. Explanation of how the school systems that approve the plan will proceed if not all involved school systems approve the plan:

If citizens of any of the three school systems fail to approve the Plan, the RPC shall be reconvened to draft a plan more likely to be approved by all school units. Failing in this, the school boards shall restart the process. [approved 11/26/07]

Item 12. Estimate of the cost savings to be achieved and how these savings will be achieved:

no proposed language at this time

Item 13. Other matters that the current boards find necessary:

A. The operational date of the RSU shall be no sooner than July 1, 2009. [approved 11/26/07]

BUCKSPORT, ORLAND, MSAD 18 REORGANIZATION PLANNING COMMITTEE PROPOSED PLAN
ADDITIONAL REQUIREMENTS FOR SYSTEMS WITH FEWER THAN 2500 STUDENTS [approved 11/26/07]

The formation of our RSU was determined in part by geography, since the upper Penobscot Bay affects transportation. It was also determined by the makeup of school units in the region. As a service center community, Bucksport is interested in a partnership with communities of the same or smaller size in order to maintain our unique character. This factor ruled out partnering with Ellsworth or Brewer. The SAD's on the west side of the river prohibited partnership with outlying communities such as Stockton Springs, Frankfort, or Winterport. Orrington has close ties with Brewer so that partnership was not an option.

There are advantages to the current make-up of RSU 9. All three school systems are active participants in the Penobscot River Educational Partnership, which is committed to providing shared services for greater efficiencies in several areas, including special education, professional development, and financial operations. All three systems contract for transportation from the same provider, which will make transitions easier. The three school systems share administrative services. All MSAD 18 students attend school in Bucksport under an exclusive contract, and 75% of Orland high school students attend Bucksport High School even though the contract stipulates at least 60%. The schools are relatively close together, allowing flexibility in programming in future years. The towns collaborate on programs and share resources. And the list goes on.

Student enrollments fluctuate in small school systems. However, the trend in these communities is for stability, with entering grades larger than in recent years. There are programs and services that will be mutually beneficial, such as building on the experience in Orland of providing a preschool program as this is considered in Bucksport, and adding Orland to the bid pool for electricity and heating oil. Professional development is being shared in the present year, as well as special education services. The Orland Principal now sits on the Bucksport Administrative Team. Computer technology assistance has improved conditions in Orland, and even in food services and maintenance, the areas where there is not oversight by the Bucksport Directors, we will implement advantages such as shared purchasing.

The RPC, school boards, and Superintendent are working hard to develop a plan that will serve the communities and children well. Many hours have been committed to this. The Superintendent began publishing a monthly newsletter in August, mailed to every household in four towns to inform citizens about the status of reorganization.

COLLABORATION: PENOBSCOT RIVER EDUCATIONAL PARTNERSHIP ACTIVITIES

The Penobscot River Educational Partnership (PREP) is a model school and University collaborative effort serving the Penobscot River Valley. The partnership has been in place since 1996 and supports member school systems in their provision of staff development, educational planning, provision of student support services, and, most recently, initiating the provision of business related services. Focusing on efficiency and effectiveness has led to increased collaboration, trust, and support to the member school units.

PREP partners include Brewer schools, Bucksport schools, Orland, School Union 90 (Alton, Bradley, Greenbush, Milford), Indian Island School, Orrington, University of Maine (College of Education & Human Development, College of Business, Public Policy & Health, College of Liberal Arts & Sciences), Old Town schools, School Administrative District 22 (Hampden, Newburgh, Winterport) Union 87 (Orono, Veazie), SAD 63 (Clifton, Eddington, Holden), United Technology Center (Bangor), and Maine Child Development Services/Penobscot County.

The following is a listing of current initiatives involving schools within the PREP Partnership.

Executive Officers

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This committee meets four times yearly and provides overall direction for PREP Initiatives. The Executive Officers are comprised of school superintendents and the Dean of the College of Education and Human Development and the Dean of the College of Business, Public Policy, and Health.

Curriculum Coordinators

This group meets monthly to provide planning, direction and support for professional improvement, student achievement, and planning for improvement.

Professional Development/Professional Learning Community Development

Guidance Initiative

This is the fourth year of this groups functioning. Overall leadership has moved from the Mitchell Institute to a group involving guidance counselors and university faculty. This group will meet five to six times a year. Members consistently speak of the support received from this community. These activities are provided at no cost.

Response to Intervention K-1 Literacy

This is the third year of this communities functioning. A significant staff development initiative is ongoing with the provision of eight days of staff development to public school staff supporting K-1 Literacy. These activities are provided at no cost. University professors in literacy and special education are providing these trainings as service to PREP Schools.

Pre-Referral Initiative

This expectation is found in the updated special education regulations. It focuses on regular education and in many ways is a continuation of the work already begun in the Response to Intervention Initiative. Dr. Marcia Davidson, Dr. Jim Artesani, and Owen Maurais have offered to facilitate long term planning for all PREP districts around this issue. The initial planning is provided at no cost to PREP school units. A proposed summer institute is projected at costing each involved school unit \$1,000.00 for the involvement of their school staff.

Professional Learning Community Development

Sue Card is providing 4 days of staff development supporting the development of a Train the Trainer format for PREP Schools around the development of Professional Learning Communities. Sessions are provided for K-5 and 6-12 staff. Cost to each school unit for this training is \$1,000.00. This funding provides access to eight full days of staff development training for 12-15 staff members from each school unit.

Curriculum Coordinators

Curriculum Coordinators are involved with a book study focusing on assessment for learning.

Adult Education

A committee has been established to review the current status of Adult Education staffing and programming within PREP school units. Initial recommendations regarding possible efficiencies in program administration and the maximizing of course offerings will be made to PREP superintendents in mid December 2007.

Teacher Preparation Committee

Representatives from school units and the University of Maine continue to refine a format to formalize communication and collaboration around a Professional Learning Community Format. Hundreds of candidates from the University of Maine are involved with PREP schools on a yearly

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basis. Enhancing communication and collaboration between the University of Maine and PREP schools provides for increased quality of programming for all individuals involved.

Virtual High School Initiative

There is interest in continued planning for the use of technology to support the development of and access to on line courses. A committee has been established to plan for and implement this initiative. A University of Maine Associate Professor in Information Technology will be assisting this committee in their initial planning. It is anticipated that recommendations will be made to PREP superintendents in late Winter 2008. Funds remaining from a previous Secondary School Initiative will fund the initial planning and development efforts.

Special Education Related Services Initiative

A psychologist, a certified psychological service provider and two speech therapists are providing evaluations and direct services to students served by the PREP partnership. They have been hired as employees. Speech services are being provided in schools where services were previously unavailable. Psychological services are being provided at a significant saving over the rate provided in a typical contracted services arrangement.

Maine Municipal Bond Bank Initiative

The Penobscot River Educational Partnership was awarded a \$100,000.00 grant from the Maine Municipal Bond Bank to support the development of efficiencies within PREP schools in areas supporting business functions. The following initiatives are supported by this grant. Some of these initiatives involved all PREP public schools and some involve a more limited pilot population of schools.

Food Service Initiative

A consultant, Kevin Freeborn, has been hired and has met with representatives of school units, making several extended visits to gather additional information prior to developing an analysis and recommendations regarding efficiency and effectiveness. PREP Superintendents will be meeting to discuss Mr. Freeborn's report and recommendations in mid December 2007.

Health, Safety and Efficiency

Three committees have been developed and are focusing on efficiencies in purchasing school safety and training needs. Each committee is identifying possible areas involving collaboration and increasing efficiencies. An update on each committee's functioning will be provided to PREP superintendents at their December meeting.

Financial Services

One PREP school unit will be initiating use of software for the management of timekeeping and payroll data. Information on this implementation will be made available to all PREP schools in the spring of 2008. Also, all PREP school units are eligible for a reduction in technical assistance costs, if they wish to access technical assistance from ADS.

Substitute Teachers

Three PREP school units will pilot a software program in early winter 2008 utilizing technology to enhance the current system of securing substitute teachers. Information gathered on effectiveness and efficiency will be shared with other school units.

BUCKSPORT, ORLAND, MSAD 18 REORGANIZATION PLANNING COMMITTEE PROPOSED PLAN

- A. Demonstrate that Bucksport, Orland, and MSAD 18 school boards “performed due diligence” to develop a regional plan with 2500 students but neighboring school systems voted to partner with others [approved 11/26/07]

A number of meetings were held in July and August when determining the partners for our school systems. Some of these were between administrators and individual board members, and some were public meetings or forums. During this period we sought a trained facilitator from the Department of Education. Most facilitators were either not working during the summer or were already over-committed. We were able to secure the services of an experienced Superintendent, Ann Bridge, whose assistance has been essential to the development of this plan. The list of all meetings follows:

- 6/25 Bucksport Public Forum on Reorganization, 6:30 pm, televised
- 6/29 Letter to Board Chairs of Dedham, Orrington, MSAD 63, MSAD 56, SU 76, SU 93
- 7/3 Meeting with Bucksport district administrators and directors to identify issues
- 7/6 Letter to Superintendents of Dedham, Orrington, MSAD 63, MSAD 56, SU 76, SU 93
- 7/8 Orland School Committee, 6 pm, regular meeting
- 7/9 Bucksport School Board, 7 pm, televised meeting
- 7/11 Superintendent + 2 Board members from Bucksport and MSAD 56, 3 pm, Central Office
- 7/11 Conversation with Castine Board Chair: not interested
- 7/11 Conversation with Dedham Board Chair: interested in meeting
- 7/11 Conversation with Penobscot Board Chair: interested in meeting
- 7/12 Two Board members attended regional meeting in Blue Hill for RSU 10 members
- 7/16 Contact with MSAD 63: interested in meeting
- 7/16 Orland, Bucksport, Penobscot Board reps and Bucksport Superintendent, meeting in Bucksport
- 7/19 MSAD 18 School Board, 6 pm, Central Office
- 7/24 Orland, Bucksport, MSAD 63 Board reps, 2 superintendents, 1 pm in Bucksport
- 7/20 Completed extensive survey for MSAD 56 Superintendent
- 7/25 Attended DWM conference with Orland and Bucksport Board members
- 8/1 Bucksport School Board, 7 pm, televised regular meeting
- 8/3 Board members from Bucksport and Dedham, meeting in Dedham
- 8/6 MSAD School Board, 7 pm, Central Office
- 8/13 MSAD 63 and Bucksport Board reps, 2 superintendents, in Holden
- 8/14 Bucksport RPC member, 6:30 pm, Town Council Chambers
- 8/14 Orland School Committee, 6 pm, regular meeting
- 8/15 Bucksport Public Forum on Reorganization, 6:30 pm, televised
- 8/16 Conversation with MSAD 63 Superintendent
- 8/22 Presentation of Bucksport Forum materials at MSAD 63 Board meeting, Public Forum on Reorganization, 7 pm, Holden
- 8/29 Bucksport School Board, 6 pm, televised

We began by pursuing a partnership with MSAD 56 based on the recommended allocation of school units on the Department of Education map. Conversations between superintendents, and between superintendents and Board leadership did not result in a partnership, as the MSAD 56 Board decided to join MSAD 34, based on the strong ties between Searsport and Belfast.

Simultaneous with this we explored partnering with MSAD 63, Dedham, and Penobscot. The Superintendent presented financial and educational analyses of this combination of towns in a televised public forum and was asked to repeat the presentation for a special meeting of the MSAD 63 Board. Dedham determined that they would stay in partnership with Brewer, which currently

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provides superintendent services to this town. The MSAD 63 Board decided that our towns might be their fourth choice for regionalization, which became a rejection of this partnership.

We received the financial analysis from the Department of Education on partnering with the towns in RSU 10. It was apparent that this would create financial hardship for our school systems, since most of the towns in RSU 10 are minimum receivers. It would also be particularly difficult to create a common K-12 school system since these towns are currently operating independent K-8 school systems, except for CSD 13 which operates a small isolated K-12 system.

We were informed in late August that the RSU 10 Boards had rejected partnership with us. After our Boards had voted to form a “doughnut hole” RSU, we learned that Penobscot had expressed interest in partnering with Bucksport. In our July meeting with Penobscot Board leadership, this interest had been narrowly focused on whether special education students would still be accepted on a tuition basis even if Penobscot did not partner with us – to which we responded with interest. In September there appeared to be continuing interest by Penobscot, but the Bucksport Board voted in October to not partner with Penobscot for a number of reasons. First, it was not clear whether this was an interest of the full board or just one part of town (based on the comments of a Penobscot Board member who attended our first RPC meeting). Second, it would have slowed progress considerably for the RPC for RSU 9 to work on dual plans: one with Penobscot and one without Penobscot. And finally, it was possible that Penobscot moving out of RSU 10 would leave enrollments too small in RSU 10 for Commissioner approval. It was not possible to secure a definitive response from the Department of Education on this matter. In the future, if Penobscot wishes to join RSU 9 there will be a complete plan for that town to choose to endorse or reject.

B. Plan provides comprehensive programming K-12 with at least 1 publicly supported high school

MSAD 18 and Bucksport students have benefited from comprehensive K-12 program for decades. The RSU will add the PK-8 program in Orland to this. Bucksport High School shall be the publicly supported high school for the RSU. [approved 11/26/07]

C. Plan is consistent with specified policies in statute

No proposed language at this time.

D. Plan does not displace students or teachers or close any schools

To be consistent with statute, no students or teachers will be displaced by this Plan, and no schools where students are educated will close because of this Plan, in the first year after the RSU becomes operational. [approved 11/26/07]

E. Reorganizes administrative functions, duties, and non-instructional personnel so the projected expenditures of the RSU for 08-09 in system administration, transportation, special education, and facilities & maintenance will not have an adverse impact on the instructional program.

The RSU will not become operational until 7/1/09 so this item does not apply, as stipulated by the Commissioner. [approved 11/26/07]